LIST OF EFFECTIVE PAGES					
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iii	1	2-1-5	1	4-1-3	0
iv	1	2-1-6	0	4-1-4	0
v	0	2-1-7	1	4-1-5	0
vi	0	2-1-8	1	4-1-6	0
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TOC 5	0	2-2-3	1	4-2-5	0
TOC 6	1	2-2-4	1	4-2-6	0
TOC 7	1	2-2-5	0		
TOC 8	1	2-2-6	0	4-3-1	0
				4-3-2	1
1-1-1	0	3-1-1	1	4-3-3	1
1-1-2	0	3-1-2	1	4-3-4	1
1-1-3	0	3-1-3	0	4-3-5	1
1-1-4	0	3-1-4	0	4-3-6	1
		3-1-5	0	4-3-7	1
1-2-1	1	3-1-6	0	4-3-8	0
1-2-2	0	3-1-7	0	4-3-9	1
		3-1-8	0	4-3-10	1
1-3-1	0			4-3-11	1
1-3-2	0	3-2-1	1	4-3-12	0
		3-2-2	1	4-3-13	1
1-4-1	0	3-2-3	0	4-3-14	1
1-4-2	0	3-2-4	0	4-3-15	1
1-4-3	0	3-2-5	0	4-3-16	1
1-4-4	0	3-2-6	0	4-3-17	1
1-4-5	0	3-2-7	0	4-3-18	1
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		3-2-9	0	4-3-20	0
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1-5-2	0			4-4-1	0
1-5-3	0	3-3-1	0	4-4-2	0
1-5-4	0	3-3-2	0	4-4-3	0
		3-3-3	0	4-4-4	0
1-6-1	0	3-3-4	0	4-4-5	0
1-6-2	0	3-3-5	0	4-4-6	0
		3-3-6	0		
2-1-1	0				
2-1-2	1				

LIST OF EFFECTIVE PAGES					
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ASSISTANCE TO RECRUITERS

010201. RECRUIT PUBLIC AFFAIRS OFFICE

a. When a parent or relative is in the Navy Recruiting Station and has questions a recruiter cannot readily answer, the recruiter is authorized to telephone the Public Affairs Office (PAO) at Recruit Training Command (RTC). If parents or relatives desire to contact RTC personally, they will be referred to the RTC PAO. Under the Privacy Act of 1974, the RTC PAO will provide only general, non-derogatory information over the telephone.

> **Public Affairs Office**
> Recruit Training Command
> Great Lakes, IL 60088-3127
> Commercial: (847)688-2405   DSN: 792-2405

Note: Refer to Volume IV, for information regarding Transient Personnel Units (TPUs) for prior service veterans not required to attend recruit training.

b. Problems. Specific problems that cannot be solved through the PAO should be referred to the NAVCRUITDIST Commanding Officer, or Commander, Navy Recruiting Region. Some particularly difficult problems may be referred to:

> **Inspector General**
> **COMNAVCRUITCOM 00IG**
> **5722 Integrity Drive**
> **Millington, TN 38054-5057**
> **Comm: (901)874-9030/31/33/34/35/36/38/54 DSN: 882**
> HOTLINE: (888) 247-9321   FAX: (901)874-9047

c. Emergency situations should be referred to:

(1) COMNAVCRUITCOM CDO: Cell Phone: (901)451-0864

(2) Red Cross: (877)272-7337 (Provide the service member's Name and SSN).

010202. INTERPRETATIONS OF CONTENT

a. Personnel requiring an interpretation of the intent of wording in this instruction shall contact their chain-of-command. In the event the chain-of-command cannot provide a satisfactory explanation, the Region representing the NAVCRUITDIST that raised the question will contact COMNAVCRUITCOM (N3).

d. Recruiters assigned to recruiting duty in the continental United States are prohibited from operating a government vehicle in or entering Canada or Mexico to conduct any recruiting business. There are no exceptions to this policy.

010410. UNIFORMS

a. The Navy Dress uniform is distinctive and is recognized and respected throughout the United States by Americans from all walks of life. The Navy's advertising effort recognizes this and builds upon it. Successful recruiters recognize this and use it to their advantage. The Navy Service Khaki uniform worn by Officers and Chief Petty Officers is also well recognized and is acceptable to be worn on recruiting duty as an alternate uniform.

b. The underline prescribed uniform for recruiting personnel, officer and enlisted, appearing at any official/formal event such as a career fair/Conference (i.e. NSBE, NAACP, etc.) television program, public gathering, or patriotic celebration shall be the appropriate Navy Dress uniform. The uniform for the daily routine, to include regular high school visits, shall be as specified by the Commanding Officer. The uniform for exceptional presentations (e.g., combat displays, physical fitness tests) will also be specified by the Commanding Officer.

010411. HOURS OF OPERATION, NAVY RECRUITING COMMAND. Commanding Officers shall prescribe working hours for Navy Recruiting Stations and support offices. Consideration will be given to staggering the working hours to permit offices to remain open during peak recruiting hours of the day.

010412. INSPECTIONS. Frequent inspections of, or visits to, Navy Recruiting Stations by the NAVCRUITDIST Commanding Officer or representative are essential to proper functioning of the recruiting effort. Recruiting methods shall be under constant inspection by the Commanding Officer so that no discredit can be brought on the Navy by questionable advertising, false promises, or unethical practices.

a. Recruiting Operations Officer, Chief Recruiter or Assistant Chief Recruiter shall conduct a production inspection whenever a Navy Recruiting Station fails to meet its assigned new contract goal for two consecutive months.

b. The Recruiting Operations Officer may grant a one-time waiver exception. Greater frequency of inspections are encouraged where circumstances and time permit.

c. PQS qualified Division Leading Chief Petty Officers and District Trainers may perform inspections/visits when directed by the Commanding Officer.

RTC. Name, school, graduation year, test score, sex, zip code, etc., may be used to pull these records.

e. <u>The Prior Service Market Segment</u>. This file contains all the names of individuals that have prior active military service.

f. <u>The In-Service Market Segment</u>. This file contains all the names of individuals who are serving on Active Duty in one of the branches of military.

g. <u>Female File Market Segment</u>. Optional for NAVCRUITDIST's use.

h. <u>Inactive Market Segment</u>. This market segment contains the applicant records of disqualified/rejected, male and female, applicants for a period of two years from the date of disqualification/rejection. This file should be purged monthly, retaining only records for a two year period from the date of disqualification/rejection.

i. <u>The Working Tickler</u>. Each individual's Complete Working Tickler is displayed when the user selects the View/Working tickler from the menu. The user can use the record query screen to select a given date range within the individuals Working Tickler.

020105. OPERATION OF THE SYSTEM. The WEBRTOOLS system allows records to be scheduled on a specific day from the present to a future date. This allows the LPO/LCPO to operate on a rolling day/month basis, keeping the next 31 days current. The LPO/LCPO shall load the records to be "worked" (prospected, tested, etc.) for the appropriate date. The records to be prospected will be selected from the pool, as necessary, to make NAVCRUITSTA goals (Non-Prior Service Work Force, "A" Cell, Black/Hispanic Test Category Upper, etc.). As the prospect is "worked" and information is collected, the recruiter shall update the applicant record appropriately.

Note: A recruiter's Working Tickler is loaded in accordance with the NAVCRUITDIST goaling letter. The Working Tickler should be loaded on the last working day of the current week for the following week. The LPO/LCPO should not let any given day build to more than 50 records.

Note: LPO/LCPO's, when loading Working Ticklers for the following week, he/she shall load the recruiters' Working Ticklers with records from specific recruiting areas 24-48 hours prior to the evolution taking place.

Example: High School visits, Area Canvassing. This event is known as preprospecting.

020106. LOADING THE WORKING TICKLER

a. When loading the working tickler, the LPO/LCPO shall:

(1) Select Tools/Build Working Tickler. A "Build Working Tickler" screen will appear. The LPO/LCPO will use this screen to enter criteria for the system to display a set of records to be loaded. The LPO/LCPO will select the name of the recruiter from a dropdown menu, this recruiter's working tickler will be loaded. The recruiter's goal is to prospect 100% of the prospect records through the use of the market segments and the working tickler.

(2) Select records that have never been prospected or have been idle for a long period of time as designated by the LPO/LCPO.

(3) Target the zip code(s) with the highest propensity to enlist first (ensuring quality is monitored). Always work from high to low.

(4) After entering your criteria, (the more parameters that the recruiter asks for, the more he/she will limit themselves on the number of records they find) Click the Get Records button. The system will display a list of records from your request. Place a check on any record to be loaded from this list. After you have selected your records, click the "Load Tickler" button on the screen. This will load all marked records into the selected recuiter's Working Tickler.

Example: The recruiter starts by asking for records with a Processing Status of "TO BE ASSIGNED". This should provide a large list.

   b. The recruiter can get more specific by looking for quality records in the primary and secondary zip codes. The recruiter must review these records before they are loaded into the Working Tickler. The records are loaded into the working tickler by the recruiter reviewing the remarks section, grad year, test score, etc., and determining if it is a quality record that he/she wants to pursue.

   c. Additionally, the LPO/LCPO will review the goaling letter to ensure all sub goals are properly loaded. It is imperative the station is prospecting to achieve all assigned sub-goals as well as NCO.

Note: The LPO/LCPO's primary job is to ensure that the team of recruiters are actively and aggressively working their market.

020107.   QUALIFIED BUT NOT ENLISTED (QNE). When an applicant QNE's, the record will remain in the recruiter's working tickler for six-months. The recruiter will contact the QNE at least once a month during this time frame. The record shall be returned to the pool in the appropriate market segment after six months.

020108.   DEP TRACKING. The DEP member's record shall be maintained in the recruiter's working tickler. Contact will be maintained and documented on the record through the entire DEP period and RTC graduation.

020109. LOCAL EFFECTIVE ACCESSION DELIVERY SYSTEM (LEADS). Locally and/or nationally produced LEADS shall be maintained in the working tickler for four months, until contracted or when disposition renders the LEAD non-workable, whichever comes first.

020110. PURGING THE SYSTEM. The WEBRTOOLS system shall be purged each time a new name list is received to prevent duplicates. In addition, when graduation occurs, the recruiter shall elevate the level of education from 11S to 12L as soon as possible following high school graduation each year, but no later than 1 September, using the Global Record Change function.

020111. UPDATING THE SYSTEM. Regular updating of the system is critical. Before entering high school records into the system, the LPO/LCPO shall ensure these records do not duplicate existing records. A copy of any list obtained shall be forwarded to LEADS in accordance with COMNAVCRUITCOMINST 1140.3. These lists can then be sent to the local LEADS Department to be electronically downloaded into the recruiter's WEBRTOOLS system. This will preclude manually entering all of the records.

020112. SOURCE CODES. WEBRTOOLS uses an ORIGINAL SOURCE code to indicate the source of downloaded records. The following list contains **Original Source** abbreviations/codes:

   a. RL - Local LEAD

   b. RN - National LEAD

   c. PN - Pro-Navy (Generated by a referral by an active duty Navy member.)

   d. MO - Mail Out (Generated at the NAVCRUITSTA with a handwritten mail out, usually done due to no phone number or door knock available.)

   e. AS - ASVAB

   f. RZ - Prior Service (Generated by a national listing of available Prior Service downloaded with LEADS.)

   g. SS - Selective Service

   h. HS - High School List

   i. RT - Name List

The following list contains **LEAD Source** abbreviations/codes:

   j. PH - Phone

k. RL - Local LEAD

l. RN - National LEAD

m. RD - DEP Referral

n. RA - Applicant Referral

o. RI - School Counselor/Center of Influence Referral

p. RS - Other Services Referral

q. PD - Personally Developed Contact

r. SN – Social Networking

s. PN - Pro-Navy

t. RP - RAP/HARP/SEMINAR Referral

u. WI - Walk-In

020113. **APPLICANT RECORD RETENTION**. Applicant records shall be retained in the appropriate market segment file at least four years from the high school graduation date (e.g., HS Grad date June 2008, remove record from file 1 July 2012).

020114. **BLUEPRINTING**

   a. The purpose of blueprinting is to reduce or eliminate call reluctance. Documentation of blueprinting is critical to the long-term success of the WEBRTOOLS system. The more information a record contains on a prospect, the better the system will work for the recruiter.

   b. During the initial interview all pertinent information shall be obtained from the applicant and placed in the applicant record. Refer to the WEBRTOOLS User's Manual for additional instructions.

   c. It is imperative the Sales/Remarks section is tabbed so each time the recruiter touches a sales activity it is recorded. A history of contacts will aid in the time management of activities within the station.

020115. **BASIC APPLICANT INFORMATION.** This field contains, at a minimum, the following information about the applicant:

   a. SSN - Applicant SSN

AFQT/DATE is for production ASVAB tests, while AUTO is for downloaded High School ASVAB tests. The first space is for the AFQT and the second space is for the test date (YYMMDD) the third space is for the test series. To view or add additional ASVAB or DLAB or NFQT, recruiter's shall use the Test Tab. Refer to the WEBRTOOLS User's Manual for further information regarding this function.

020119. BLUEPRINT. The only information required in the Blueprint screen is a BLUEPRINT DATE , LEAD SOURCE and CIRCUMSTANCES . The Height and Weight (HT/WT) will generate a MAXIMUM weight allowed only if there is either an M or F in the sex field. REMARKS, NEED, SALES SUPPORT - are used for gathering information to better build rapport. Also part of the Blueprint screen lists questions dealing with DRUG, MEDICAL, and POLICE involvement/history.

Note: Police, medical and drug problems will be saved within the Remarks section of the records.

020120. REMARKS. If there are no previous remarks on the record, the system will automatically provide a new comment box . Since WEBRTOOLS enters a date time stamp every time a remark is added, there is no need to add the date in your remarks unless it is to reflect something that has already occurred (i.e. a late entry). If a REMARK already exists, the recruiter shall use the new comment box . A recruiter shall use New Comment every time they make a remark on a Future Sailor's record. A recruiter shall indicate where the LPO/LCPO should place the record for disposition.

020121. SALES ACTIVITY. This function shall be used every time a recruiter makes an attempt, attempt and contact, contact and appointment, maintenance call or any type of DEP contact. This is not an automatic function of the WEBRTOOLS system. This area is also utilized to log DEP PHONE and DEP IN-PERSON contacts.

Note: "Contact" means actually talking to the applicant. If the recruiter talks to mom, dad, a brother or sister, the recruiter shall use attempt and document in remarks that one of these individuals was talked to, and record any blueprint information that was obtained.

020122. MARKET STATUS. This function is used to assign the appropriate market segment to an applicant. By pressing on the dropdown menu button, the recruiter will receive a menu of different market segments. The only segment the recruiter is not able to select is INACTIVE. INACTIVE is reserved for the LPO/LCPO. The recruiter moves the light bar to the market segment he/she wishes to use to identify the applicant and selects it.

020123. ADDITIONAL. This is the section where information not included in Data Record is located. The fields for spouse, mother, and father names, email address, languages, religion, citizenship, etc. are located within this section. This information will be needed for the application. The recruiter shall enter this data in this section during the initial interview. **Note:** This information is needed to populate the enlistment kit.

020124. OTHER TABS. Information on other Tabs can be found in the WEBRTOOLS User's Guide. When the recruiter has completed all data entries, the next step is for the recruiter to access another record.

020125. **LEADING PETTY OFFICER/LEADING CHIEF PETTY OFFICER**. This section details information specifically for the Leading Petty Officer/Leading Chief Petty Officer (LPO/LCPO). The primary areas covered in this section are:

   a. Administration

   b. Prospecting

   c. Market Analysis

   d. WEBRTOOLS Daily Production Review

Note: This section will contain specific information from loading Working Ticklers, transferring records between recruiting stations to reassigning recruiter territory.

   e. Administration. The administration of the system is extremely important. The areas that the LPO/LCPO needs to review in the WEBRTOOLS User's Guide are transferring territory between Recruiters/Stations/ Districts, and Global Record Changes.

   f. Adding/Deleting Users. There are times when the LPO/LCPO will need to add or delete recruiters from the system. LPO/LCPO's should contact the NAVCRUITDIST Sysad to enter a NAVCRUITCOM Footprints Trouble Ticket.

   g. Transferring Territory. At times the LPO/LCPO will need to reassign recruiter territory or transfer market to another NAVCRUITSTA. REASSIGN TICKLER allows the LPO/LCPO to reassign all or portions of a Working Tickler to the recruiter that is inheriting that territory. TRANSFER RECORDS is used to transfer records between Recruiting Stations/ Districts.

    (1) Reassign Tickler - This function would be used to reassign a Working Tickler to another recruiter or recruiters when a recruiter transfers or there is a need to reassign territory.

    (2) Transfer Records - This function is to be used when transferring records to another station or recruiting district.

   h. Global Record Change. Global Record Change can be used to change an 11S to 12L, move them into the different market segments, change Grad Year and delete a large number of records at one time.

SECTION 2

COMNAVCRUITCOM INTEGRATED RECRUITING INFORMATION MANAGEMENT SYSTEM (CIRIMS) WEB

020201. PURPOSE. Recruiters shall use ***CIRIMS Web (CW)*** to work their leads, process and print their kits, obtain accession approval from higher level approval authority, report accession and attrite information and complete a Daily Production Review (DPR).

a. In addition, LPO/LCPO's will use CW to assign/reassign LEADS, view the leads for their other recruiters.

b. Division Leading Chief Petty Officers will use CW to; review station leads and Kit Tracking records,; and send attrite requests to their NAVCRUITDIST.

c. NAVCRUITDIST QA will use CW to; process accession applications and run reports regarding attainment, drill verifications reservations and other statistical reports.

d. NAVCRUITDIST Enlisted OPS will use CW to; approve reports of accessions and run reports regarding attainment, drill verifications reservations and other statistical reports.

e. All other operations personnel at the NAVCRUITDIST, Region and HQ will use CW for reporting and management.

Note 1: CIRIMS Web (CW) has an online and downloadable version of the SOP. The SOP gives step by step instructions with actual screen shots to guide the user through the use of the application.

Note 2: CIRIMS Web (CW) is a role based system which means access and functions will be granted based on the user's role such as Recruiter, LPO/LCPO, etc.

020202. ACCESSING CIRIMS WEB. Open Internet Explorer. The web site address is: https://cirims.cnrc.navy.mil/cirims

a. Enter the above address in the URL field or use a favorites or shortcut list.

b. You must be connected to the internet to access CIRIMS Web.

c. Login using your Username and Password.

020203. MAIN CIRIMS MENU. The CIRIMS main menu has four main groups; Home, Modules, Utilities and Search, Clicking a group will display a list of items for that group.

020204. HOME GROUP. The Home group has two items:

a. Logout – Logs the user off and returns to the CIRIMS Web login screen.

b. Messages – Enables users to send and receive messages. Messages are also sent from the system to provide information about specific applicant milestones and general system information such as updates.

020205. MODULE GROUP. Displays the application modules the user is allowed to access. For example, most users will see the Contact Management, DPR Kit Tracking and Reporter modules. OOM will see Physical Review, the National CR will see Reservations, CARIT personnel will see CARIT Classes and CARIT Registration and Fleet Counselors will see Add FTN Contact.

020206. UTILITIES GROUP. There are three items; Downloads, FootPrints and Tools. Downloads provides an area where training and help files can be placed for users to download. FootPrints provides a link to the FootPrints program to assist the user in submitting a FootPrints request for assistance. Tools provides a list of actions that can be performed by the user based on their role.

020207. SEARCH GROUP. There are five searches available:

a. Contact – search locally or nationally for a contact

b. Recruiter – find anyone in recruiting who has a CW account. Users can edit their own record to add or edit; birth date and phone contact information

c. Station – find any recruiting station by District and Division or by RSID

d. Police – find police agencies, add and edit

e. UIC – find UICs, add and edit – used for the assignment orders.

f. ZIP Code – find a recruiting station responsible for a ZIP code

020208. APPLICATION. To utilize the data in this system for prospecting, processing, requesting accession approval, reporting accessions, attrites and the completion of the applicant's first drill. To retain information on each prospect for future application.

020209. APPLICANT RECORDS FILES. Applicant records shall be assigned by the LPO/LCPO to the recruiters. All records shall be assigned and worked throughout the year. Each applicant record shall be assigned a Status which also serves as a Market Segment.

020210. STATUS AND MARKET SEGMENTS

   a. AF – Affiliation File. All applicant records that have been accessed into the Navy Reserve.

   b. AP – DPEP Market Segment. All records for potential applicants for the Direct Procurement Enlistment Program (DPEP).

   c. DF – Dead File. All records that have been determined to be; permanently disqualified, are unlocatable or who have requested no further contact from Navy Reserve recruiters.

   d. DL – Duplicate Lead. Records that have been marked as a duplicate lead by the recruiter.

   e. IP – In Processing. Records for applicants who are currently processing for accession into the Navy Reserve.

   f. NA – Not Assigned. Records that have not yet been assigned to a recruiter.

   g. NW – Newly Assigned. Records that have been recently assigned to recruiters.

   h. OV – OSVET Market Segment. This market segment contains all records for potential applicants with prior military service other than Navy.

   i. PS – Package Submitted. All records for applicants in which the accession request has been routed to higher level approval authority.

   j. RF – Rating File Market Segment. All records for potential applicants with prior military service in the Navy.

   k. UN – Unknown. This is optional and is used when the recruiter does not know for which program the applicant will be processing.

020211. OPERATION OF THE SYSTEM. The CIRIMS Web system allows records to be scheduled on a specific day from the present to a future date. This allows the recruiter to operate on a rolling day/month basis, keeping the next 31 days current. As the prospect is "worked" and information is collected, the recruiter shall update the applicant record appropriately.

Note: The LPO/LCPO shall ensure their recruiters have sufficient prospecting activity scheduled for each day.

020212. SCHEDULING PROSPECTING ACTIVITY. When scheduling prospecting activity the recruiter shall:

a. Open the applicant record and click the Schedule NA Icon. From there they will select the next prospecting action and date. The recruiter can schedule multiple prospecting actions. For example, a recruiter may schedule a mailout for Thursday and then schedule a prospecting phone call on the following Tuesday. The Next Action and Next Action dates fields on the applicant record will always display the earliest next action.

b. When the recruiter is unsuccessful in scheduling an appointment they will schedule the applicant record for some form of prospecting within the next 30-90 days or as determined by the LPO/LCPO.

c. LPO/LCPO's shall ensure their recruiters are scheduling the appropriate level of activity in the target market segments.

Note: The LPO/LCPO's primary job is to ensure their team of recruiters is actively and aggressively working the appropriate markets.

020213. **UPDATING THE SYSTEM**. Regular updating of the system is critical. A copy of any list obtained shall be forwarded to LEADS in accordance with COMNAVCRUITCOMINST 1140.3. These lists can then be sent to the local LEADS Department to be electronically downloaded into the recruiter's CIRIMS Web system along with the daily LEADS download. This will preclude manually entering all of the records.

020214. **SOURCE CODES**. CIRIMS Web uses an ORIGINAL SOURCE code to indicate the source of downloaded records. The following list contains **Original Source** abbreviations/codes:

Code   Description
AF   Air Force
AP   Army
BP   BUPERS
CC   Call Center
CE   CARIT LANT
CS   Cyberspace
CW   CARIT PAC
DM   DMDC
EW   Campbell-Ewald
FN   Fleet to NOSC (FTN) Program
HQ   HEADQUARTERS
IB   I-BOARD
JP   JRAP
N3   NAVCRUITCOM N3
NC   NASCAR
NL   NALTS
NR   NRPC

CHAPTER 3

MARKET ANALYSIS - ACTIVE COMPONENT

SECTION 1

STANDARDIZED TERRITORY EVALUATION AND ANALYSIS FOR MARKETING (STEAM) TECHNIQUE

030101. INTRODUCTION. Market Analysis is critical to mission success by assisting recruiters in identifying and analyzing their market areas. This chapter will discuss the Active Component (AC) and Reserve Component (RC) as separate systems.

030102. STANDARDIZED TERRITORY EVALUATION AND ANALYSIS FOR MANAGEMENT (STEAM). STEAM is the primary source of market research data to identify the recruiting market and determine market potential. The STEAM database contains demographic, Navy, All Service Accession Data (ASAD), LEADS, and ASVAB test taker data. STEAM subdivides these groups by race and ethnic categories and provides ASVAB Test Score Category (TSC) estimates for both TSC I-IIIA and IIIB mental groups. All population data in STEAM is tailored to reflect the number of people available for military recruitment. STEAM has algorithms that NAVCRUITREGs and NAVCRUITDISTs use to assign recruiting goals (The Goal Matrix). The advantage of STEAM is that it provides an analytical process by which NAVCRUITREGs and NAVCRUITDISTs can perform market research activities. The STEAM Model shall be used as the starting point for assigning recruiters, goals, and market analysis. The model is flexible, and can be adjusted to account for unusual market factors. The term STEAM is used in several ways:

    a. STEAM is COMNAVCRUITCOM's market research model for making decisions on recruiting personnel placement by zip codes, setting goals at the NAVCRUITDIST, Division, and station level, and market analysis. It allows users to quickly assess market research data to make resource decisions. It provides a visual/graphical map-based interface of the resulting market data, as well as an extensive reporting feature. Districts are required to use STEAM at least annually to review and analyze the market for each station and division.

    b. WebSTEAM. The current version of the STEAM is referred to as WebSTEAM. WebSTEAM may be accessed from the Recruiting Quarterdeck or by using Internet Explorer to navigate to: https://WebSTEAM.cnrc.navy.mil/STEAM/. To access the link, the user must have a COMNAVCRUITCOM user ID, PASSWORD (PW) and a PKI certificate. WebSTEAM uses the same USER ID and PW to access the COMNAVCRUITCOM INTRANET. A User's Guide is located on the WebSTEAM Homepage.

    c. Training on STEAM. COMNAVCRUITCOM (N7) provides training and technical guidance on the use of the STEAM model via e-learning sessions and onsite visits.

To request specific training , submit enclosure (8) , Field Training Request of COMNAVCRUITCOMINST 1500.4N (Training Program Policy and Procedures for Navy Recruiting Command Field Activities) to NRC via your Region.

 d. <u>STEAM Operation and Maintenance</u>. COMNAVCRUITCOM (N52) maintains the STEAM database and the software necessary to execute WebSTEAM. In addition, they provide online help via the Feedback function of WebSTEAM.

 e. Permanent changes to WebSTEAM are made via program codes. All NAVCRUITDIST alignment changes shall be updated as directed by the NAVCRUITDIST. All market research data shall be updated and maintained to include:

  (1) All Service Contracts (Gross) (ASCD) and All Service Accession Data (ASAD) obtained from the Defense Manpower Data Center (DMDC).

  (2) Navy New Contract Data (NET) obtained from PRIDE.

  (3) Zip Code Demographic Census Data purchased commercially.

  (4) Recruiting Facility Data from Recruiting Facilities Management Information System (RFMIS).

  (5) Recruiting Personnel Data from the COMNAVCRUITCOM Personnel Status Report (PSR).

  (6) High school and College/University data obtained both commercially and from USMEPCOM.

  (7) ASVAB Student Testing Program (STD) data obtained from USMEPCOM.

  (8) Advertising LEADS data for local and national advertising obtained via National Advertising Leads Tracking System (NALTS).

030103. STEAM REPORTS. The reports in STEAM provide the user with many levels of output on demographic and production related data. The standard reports are:

 a. Goal Matrix – Goals and sub goals by station.

 b. Leads Zip Code Report – Zip code alignment of NAVCRUITSTA given to NALTS to verify current zip codes of NAVCRUITSTA.

 c. Market Share – Zip code level demographic and production data for NAVCRUITSTA, Division or the entire NAVCRUITDIST.

SECTION 2

STATION MARKET ANALYSIS AND REVIEW TECHNIQUE (SMART)

030201. **INTRODUCTION.** The SMART system was designed to target quality market centers. It shows where recruiting resources should be focused to achieve the best possible results. Recruiters can compare and analyze strengths and weaknesses in their area of responsibility so new strategies and training methods may be applied. The data produced by STEAM provides the majority of the information needed for the SMART system. A view of a station's SMART territory map can be viewed in WebSTEAM. To view a SMART territory map of the NAVCRUITSTA, go to the quarterdeck (**https://rq.COMNAVCRUITCOM.navy.mil/**) click on WebSTEAM, enter user name and password. On the homepage select the NAVCRUITDIST, then scroll down to Divisions. Select the scissors on the division, use the scissors and cut the Division, then scroll down to the recruiting station. On the WebSTEAM tool bar, click the icon that looks like a magic wand (this is the SMART Board Icon). Information about the symbols for the SMART territory map may be viewed by clicking on the question icon on the WEBSTEAM tool bar. Click on the icon "Build a Thematic Map" to view accessions by zip code. The SMART system consists of:

a. <u>NAVCRUITSTA Territorial Map</u>. A map of the stations' area of responsibility (AOR) must be large enough to post the entire territory in detail. A NAVCRUITSTA with both rural and metropolitan areas may require two maps to adequately represent the AOR. One map should cover the entire territory and the second should cover just the metropolitan area, but in more detail than the rural map. The geographic subdivisions used shall be large enough to permit meaningful analysis and obtain reliable market data. All this may be viewed on WebSTEAM. Data provided by STEAM, LEADS, and the DoD ASAD report is distributed by zip code so the territorial map must reflect zip code boundaries. NAVCRUITSTAs unable to access and use WebSTEAM should use the following guidelines to develop a NAVCRUITSTA Territorial Map manually. Obtain a map of the NAVCRUITSTA for the SMART Board and outline the individual recruiter AOR and NAVCRUITSTA boundary in map tape or marker. Indicate the following locations:

(1) Red Star-NAVCRUITSTA. If a NAVCRUITSTA has a Part-Time Office (PTO) print a "P" on top of or next to the Red Star that locates the PTO. A part-time office is a subordinate office that may be manned on specific days or may operate with a permanently assigned recruiter who reports to a LPO/LCPO of a main NAVCRUITSTA. A PTO must be in the boundary of the NAVCRUITSTA. Use a Red Star to also indicate the location of a military Reserve Center by placing an "R" on top or next to the Red Star.

(2) Blue Star - High school. To indicate a NJROTC high school, print an "N" on top of or next to the blue star.

(3) Green Star - Two-year college.

(4) Gold Star - Four-year college.

(5) Silver Star - Trade school/VOTECH (post high school).

(6) Use a 3 x 5 inch card affixed to the NAVCRUITSTA territorial map to explain coding.

b. <u>DoD All Service Accession Data</u>. The current DoD All Service Accession Data (ASAD) report with statistics from the previous quarter shall be retained as part of the SMART system. End of the fiscal year ASAD reports shall be retained for two years. ASAD is useful in analyzing trends of market potential and areas where the Navy and other recruiting services have been successful in generating quality contracts and accessions.

c. <u>Goal Recap Sheets</u>. The Goal Recap Sheet is to be used at the NAVCRUITSTA and Division level. A current copy of the NAVCRUITSTA Goal Recap Sheet shall be posted on the SMART board and the two previous years shall be retained on file. The Leading Chief Petty Officer shall maintain a current copy of the Division Goal Recap Sheet and retain the previous two years on file. The NAVCRUITDIST Goal Recap Sheet is to be maintained at the NAVCRUITDIST level and may be used at the Region level if desired. The NAVCRUITDIST shall retain all NAVCRUITDIST Goal Recap Sheets for historical data. The Goal Recap Sheet can be used as either a spreadsheet or a paper record of goals and attainments and should be updated regularly to provide a valuable "at-a-glance" evaluation of a station, Division or district. The Division and station spreadsheets are excellent tools for tracking performance. As data is entered, the spreadsheet will calculate a fiscal year to date summary at the bottom of the sheet. This data will provide the Division Leading Chief Petty Officer and LPO/LCPO a quick reference for where emphasis must be placed for a division or station to get on track to meet fiscal year goals. In addition, the spreadsheets will generate messages for months in which data is entered based on attainment of goals. When all goals are attained, the message: "Made Goal" will be displayed. The Enlisted Programs Department will maintain the spreadsheets and use them in conjunction with the monthly goaling letter/notice. The Goal Recap Spreadsheet will be generated by the NAVCRUITDIST and used at the NAVCRUITSTA and Division level.

d. <u>DEP Status Board</u>. The DEP status Board is used to maintain a twelve-month rolling picture of the DEP Pool. As an individual enters the DEP, their name, high school, ship date, program information and recruiter's name is entered in grease pencil on the DEP Status Board. DEP referrals are also tracked for each DEP member. The DEP Status Board will be placed in a prominent location visible to both applicants and DEP members. Information must be current and correct. The blocks at the top of the DEP Status Board should be completed as follows:

(1) SYTD WG TARGET: Total number of Will Grads assigned as a target within the NAVCRUITSTA for the present school year. This number will be a percentage of your total Will Grad market and will be assigned by the Chief Recruiter.

after completion of the current school year. In June, the LPO/LCPO and recruiters must develop a new annual plan that focuses on the following objectives:

1. Initial Visits. The Initial Visit is the first formal visit of the program year. During the visit, recruiters inform high school officials about the various programs and opportunities the Navy has to offer. The Initial Visit is the time to gather information about the school, confirm scheduled talks and ASVAB testing, and complete the High School Folders.

2. Final Visits. The "Final Visit" is conducted in working schools to close out the current senior program year and begin to develop a plan for the upcoming senior program year. This visit is conducted during April or May of the current senior year. During this visit, recruiters should discuss with school officials the attitudes of the faculty about supporting Navy recruiting. The final visit is also the time to gather statistical information about the upcoming senior class and ask school officials for a list of the current junior (soon to be senior) class members. The recruiter should also propose possible dates for career, NROTC and band talks for the upcoming fall semester. Additionally, ASVAB testing and on campus area canvassing should be discussed with all information recorded in the High School/Community College folders.

3. First Future Sailor. The first Future Sailor is the first senior enlisted from any school. They should be recognized as the "1st Future Sailor" within the DEP Pool. The 1st Future Sailor is the initial source for referrals, lists, list verification, and other information about the school. Enlist a 1st Future Sailor in each school as early as possible, preferably during the summer, using the 365 day Delayed Entry Program. The sooner a 1st Future Sailor is in the DEP and working, the greater the production potential within the school. The first enlistment from a Community College is also considered a 1st senior.

4. Lists. These are lists of male students for each high school/community college. A list is termed "bona fide" when you have names with an address or a phone number for 90% of the male seniors or males of a particular college class.

5. Armed Service Vocational Aptitude Battery (ASVAB) Testing Program. The ASVAB Testing Program utilizes DoD's ASVAB test in those schools assigned by MEPS to the NAVCRUITSTA. Besides being another source for senior lists, ASVAB testing of all or a majority of students saves recruiters an enormous amount of time in mental screening and testing at MET sites. The ASVAB Testing Program should be presented to all high schools regardless of service responsibility.

6. NROTC Presentations. These are classroom presentations that not only provide information about the Naval Reserve Officer Training Corps (NROTC) scholarships programs, but are also an opportunity to gain exposure and stimulate interest in other programs. Scheduling and publicizing talks in advance usually maximizes attendance; however, there is no minimum number of students that must "show" for the presentation to be counted.

7. <u>Career Talks</u>. These are presentations, usually during Career Days, where the opportunities and benefits of enlistment in the Navy are discussed to large groups of students. Team talks with athletes and Vo-Tech presentations are included in this category. Scheduling and publicizing talks in advance usually maximizes attendance; however, there is no minimum number of students that must "show" for the talk to be counted.

8. <u>Band Presentations</u>. These are presentations with student musicians to present the Musicians Enlistment Options. Scheduling and publicizing presentations in advance with the Band Director usually maximize attendance and contacts; however, there is no minimum number of musicians that must "show" for the presentation to be counted.

Note: The effectiveness of school talks and presentations can be enhanced by developing an outline, or "<u>script</u>." This should be <u>rehearsed</u> for quality and content before presentation. Once at the school, the recruiter should present points in a relaxed but enthusiastic manner. This will be easier if the material is both understood and rehearsed.

Note: All school presentations will be in the appropriate DRESS uniform. Absolutely no civilian or PT gear will be worn to school presentations, under any circumstances.

c. Recruiters should take advantage of the <u>media support</u> available when making a school presentation. Play the NROTC tape as part of the NROTC Talk. This is high quality support material that will "warm up" the audience.

040302. <u>COLLECTING AND ORGANIZING SCHOOL INFORMATION</u>. To develop a sound plan for the upcoming high school program, the <mark>LPO/LCPO</mark> and recruiter must gather current information about their schools, organize it and then evaluate it to determine the best course of action. To do this the following steps must be initiated:

a. Identify all high schools in the area.

b. Review known schools for changes in population, closings, consolidations, relocations, or new openings.

c. Organize the information obtained from each school on a <u>new</u> High School/Community College folder by 1 June of each year.

d. After gathering and organizing the information on all schools, the recruiter and WCS must evaluate the information to determine which schools will have the elements of the High School Program worked. Factors to consider are access, past productivity, and size of the male senior or college class population.

e. The recruiter should also consider the assets available to support the program in each working school by asking the following questions:

(1) What talents does the recruiter possess that may be of value to the school and of interest to the students?

(2) What help is available from other sources? Are these sources school board members, teachers, or coaches? For example:

(a) Sailors in local Reserve unit

(b) Sailors in Mobilization Training Units (MTUs)

(c) Former Navy and retirees (Navy League, etc.)

(d) Command Group members

(3) Who returns from boot camp during the year that recently graduated from the high school?

(4) Who in the community can help gain access and influence policy in the schools?

(5) What promotional materials does the NAVCRUITSTA/ NAVCRUITDIST have to offer the school?

(6) What service can the local Reserve unit(s) provide to assist in talks, presentations, Career Days, displays, etc.?

040303. WORKING YOUR SCHOOLS. Once the HS/CC Plan is finalized, recruiters are responsible for executing it and working their schools. The prospects loaded in the Working Tickler assists recruiters in systematically working assigned schools and carrying out the plan. Each year, the recruiter must prepare a new HS/CC folder for every working high school and community college assigned. The HS/CC folder outlines the minimum program and the required action dates for accomplishing it in each working school. All scheduled visits and other relevant information are recorded in this card. The final plan must meet and be consistent with the established NAVCRUITDIST milestones. Both LPO/LCPO and DLCPO must sign off on the plan in the school folder. When signed by the LPO/LCPO, the plan is understood and acknowledged as a legitimate working plan, which will be carried out by the recruiter.

040304. PREPARING FOR YOUR INITIAL VISIT. The Initial Visit is crucial and its importance cannot be overemphasized. It sets the pace of the program and tenor of the recruiter's relationship with the school. An appointment must be made with a school official (principal, dean, or head guidance counselor) for the Initial Visit and place the action date on the HS/CC folder. All working schools will have initial visits completed in accordance with the Division Leading Chief Petty Officer's milestones.

a. Before the recruiter visits the school, some basic information should be considered and preparations made. For instance, is it primarily a VO/TECH school or academic? Are promotional materials, proof sources, and business cards ready? Has the recruiter practiced anticipated selling skills required? Remember, schools are as different as people and will have different needs to be satisfied. Recruiters must probe to uncover those needs and support them by selling the program. Has the recruiter considered possible probes to uncover needs and role-played the selling skills required to support them? Also, recruiters shall review the Division Leading Chief Petty Officer's milestones for the upcoming school year and the previous years' school folders.

b. The LPO/LCPO should be available to both rehearse the initial visit through role-playing and coaching during the actual visit.

c. The recruiter should ensure the new HS/CC folder are brought on the Initial Visit so any additional information can be immediately included or future visits/events scheduled.

d. Specific goals or objectives for the Initial Visit must be considered. Depending on the existing circumstances in the school some of the goals might be:

(1) Gain full access to the school, including use of school facilities for DEP meetings/functions.

(2) Review dates for Career, NROTC, and Band Talks.

(3) Obtain lists. Generally, lists will be obtained during the final visit of the previous program year. This will allow the recruiter to prospect during the summer months. The recruiter should obtain a new list during the initial visit or as near to the beginning of the new school year as possible to ensure list information is accurate and current.

(4) Reconfirm ASVAB testing dates.

(5) Meet with all department heads (e.g., guidance, athletic, band, etc.).

(6) Obtain an area or space to display brochures, literature, and instructional videos.

(7) Obtain a schedule or calendar of school events.

040305. CONDUCTING THE INITIAL VISIT. When making the Initial Visit, it is important for the recruiter to emphasize and clearly explain the following aspects of the programs:

a. NROTC Scholarship Program. Encourage guidance counselors to publicize the availability of the scholarship and application deadlines in the school's media, especially in material sent to the Parent Teachers Association (PTA) or students' parents.

b. ASVAB Testing Program

(1) Explain that the ASVAB is a DoD sponsored, nationwide test that measures aptitude. Emphasize that the test relates to a variety of job skills and occupations, which can help counselors in their guidance of students.

(2) Stress that the ASVAB is absolutely free and the administration and proctoring of the test is handled completely by DoD personnel.

(3) Request the school make testing mandatory or at least publicize it sufficiently in advance to maximize participation.

(4) Ensure test dates are coordinated with the LPO/LCPO.

040306. REQUESTING LISTS. The recruiter must ask for a senior list or post–grad list, even if a list was obtained during the final visit of the previous school year. Schools who are reluctant to provide lists are sometimes willing to provide a listing of seniors who graduated the previous year. Obtaining a new list will ensure the recruiter has an exact representation of students that returned to school. Obtaining or not obtaining a list must be reported to the NAVCRUITDIST Education Service's Specialist (ESS) for updating of the Recruiter Access to High Schools (RAHs) database.

a. It is important to stress that a list allows flexibility in contacting students and parents about Navy opportunities, especially when school is closed or if students are not available during school hours.

b. If lists cannot be obtained because of school policy or other reasons, there are other ways of compiling and obtaining names of seniors or college students.

(1) If the school will not provide a complete senior list, (i.e., name, address, and phone number), request a partial list.

(2) Pursue other avenues to obtain names or lists through the following:

(a) High School Directory. Some schools publish a directory that lists all of the students in the school, grouped by school year. The directory is normally published in the Fall and is usually available in the school library.

(b) High School Yearbook. Most schools publish a yearbook. Some may include names, addresses, and phone numbers of seniors as well as juniors. Yearbooks are usually available in school libraries or can be temporarily loaned from Future Sailors. Even though yearbooks are published near the end of the year, they are still useful in verifying list contact sheets.

(c) <u>Newspapers</u>. Local newspapers often publish the names of high school graduates. In some cases addresses are included. Check local daily and weekly newspapers for their policy on this matter.

(d) <u>School Photographers and Jewelers</u>. Another source of lists are photographers and jewelers. Sometime during the junior year or early in the senior year, students are photographed and fitted for class rings. Often these businesses have a complete list of student addresses and phone numbers.

(e) <u>School Library</u>. School libraries normally have a list of mailing addresses in order to notify students about overdue books. A list of student mailing addresses may be obtained through a library contact.

(f) <u>School Website</u>. Many schools have a web site and directory information can be obtained by review of these sites. In addition to lists, most of the time you will find faculty, courses, graduation dates, holidays, honor role lists etc. Take full advantage of the school's website. Email the staff and develop relationships to help the recruiting effort. If you have Navy training which will allow you to be an asset to the school's website, offer your time to help teach students running the website.

c. Lists can be pieced together by the following methods:

(1) Bureau of Labor Statistics

(2) Attendance rosters from talks

(3) Names from area canvassing and referrals

(4) ASVAB lists

040307. CONCLUDING THE INITIAL VISIT. The following measures are to be completed by the recruiter when concluding the initial visit:

a. Place any additional information obtained during the Initial Visit in the HS/CC folder.

b. Place any agreed on dates for the program in the HS/CC folder in the column next to the appropriate area.

c. Record the results of the Initial Visit and put general comments in the folder.

d. Put future action dates in the folder to follow up on any outstanding matters or unscheduled events.

e. Ensure the Initial Visit is reported to the LPO/LCPO who is required to update and record comments in the folder

j. Use returning Sailors in technical NECs for vocational presentations or Career Talks at vocational schools.

k. Attend graduations and award ceremonies to present Navy awards.

l. Arrange to have the NROTC scholarships presented by the CO, XO, OPO, R-OPS, or other commissioned officers. Community commissioned officers who are retired or USNR and NROTC representatives from Universities can also be utilized.

m. Avoid superficial or routine visits. Always plan something that has a purpose that is productive and beneficial both to the recruiter and school.

n. Fruit Stands. A "fruit stand" is a full display of Navy print and video advertising in a high traffic area of the school to attract prospects. When using "fruit stands" keep the following in mind:

(1) Wear the Dress Uniform

(2) Display Navy literature, the blue Navy recruiting service blanket, TV, and a variety of DVD's or films

(3) Hold expensive promotional items such as T-shirts and Hats in reserve for applicants who request appointments and share information

(4) Lay out limited materials; have prospects fill out cards to send them information

(5) Involve Future Sailors and HARP personnel

(6) Aggressively follow up all contacts

o. Send "Thank You" notes to principals, counselors, secretaries, and staff who assisted in the recruiting effort at appropriate times during the year. Schedule these dates on HS/CC Folder. These courtesies should enhance cooperation and reap long-term benefits.

p. Contact a representative at the school newspaper. Ask them to prepare a story on the recruiter or HARP Recruiter from the school. This will give both the recruiter and Navy greater exposure to the student body.

040309. YEARLY PLANNING. Once all information is gathered, and checked for accuracy and evaluated, the planning process begins.

a. The Division Leading Chief Petty Officer and LPO/LCPO, with input from the recruiter, begin the detailed planning for the annual program. A detailed HS/CC Program must be developed. The HS/CC school folder is the source document for the yearly program. The more interest and effort taken in planning the program, the greater the contracting potential will be

realized, and, more specifically, the better the recruiter can manage recruiting efforts. In order to plan, organize and conduct an effective HS/CC Program, the recruiter must be able to analyze and evaluate the HS/CC Program.

    b. <u>The program cycle</u>. The HS/CC Program does not run concurrent with the traditional fiscal year, nor should it. Traditional high school institutions in the United States generally begin their school year in late August or early September and continue till late May or mid June of the following year. For this reason, the HS/CC Program begins for any particular school as soon as the high school junior year for that particular school ends. Keep in mind that in order to contract individuals from these institutions, individuals must qualify for a traditional senior class program and there must be less than 365 days remaining before they will graduate from that traditional program.   The program cycle officially begins when the recruiter conducts the "final visit" with each institution. During the final visit the following objectives will be evaluated.

      (1) How well "Navy Recruiting Representatives" are received by this institution and by the faculty in general

      (2) Fill out section one of a new HS/CC folder

      (3) Determine the relationship the recruiter has with each particular high school. This relationship will be used to determine the following categories for the upcoming HS/CC Program year:

        (a) Access

        (b) Status

        (c) Priority

040310. ACCESS, STATUS, AND PRIORITY. It is essential that the ==LPO/LCPO== understand the proper definitions of Access, Status and Priority. In order to properly document the NAVCRUITSTA's efforts with each school, all three terms must be defined sequentially and, subsequently, definitions must be considered individually.

    a. <u>Access</u>. The first step in developing a yearly plan is to review the HS/CC Profile Sheets and the previous year's High School Program Master Planning Sheets. This will help determine the <u>previous</u> Access, Status, and Priority for each school. Most recruiting areas have many schools of various sizes and types. In some cases, recruiters will have more schools in their area than they have time to work effectively on a full-time basis.

      (1) One of the primary objectives of the ==LPO/LCPO== is to persuade all schools to allow full access to recruiting activities; therefore, the first step in this process is to determine the level of access for each school. The relationship with each school can change from school year to school year because of changes in administration or school

policy. Even recruiter changes can have negative or positive influence on the relationship that exists with schools. Because the possibility exists that the relationship will change, the relationship must be defined before a plan can be developed for the upcoming school year. (If a station has no access, contact the Education Specialists to work on the access problem. Education Specialists are professional educators familiar with the workings and chain of command of school systems. Most of the time, Education Specialists have long standing relationships with faculty.

        (2) For the purpose of Navy Recruiting, "Access" does not mean access to the school itself, but refers to access to the student body in general. It is a reflection of the relationship that the Navy, or the military in general, has with a particular school. To a large degree, it represents the attitude or policies the school has concerning recruiting activities with their student population. This relationship is captured on the front of the HS/CC folder and will be defined with one of the below listed categories:

        (a) Full Access (F). Student directory information can be obtained and recruiters can visit the school during school hours with no unreasonable access limitations to the student population. In order for a school to be defined as "Full Access", all of the following conditions must be met. The example cited below will be utilized to assist in determining the access of the school.

        1. On campus canvassing is allowed

        2. Student directory information for 90% of the senior class can be obtained through any source

        3. Support programs can be run (i.e. Awards, etc.)

        4. Talks can be conducted (Career/NROTC/Band Talks, etc.)

        5. All of the items listed in the Division Leading Chief Petty Officers milestones can be conducted (With the exception of ASVAB testing.)

Full Access Example

Activity	Allowed	
	Yes	No
Initial Visit	X	
Career Talks	X	
NROTC Talks	X	
Band Talks	X	
ASVAB		X
Certificate Prg	X	
Final Visit	X	
PDC Campus	X	
Official List	X	

immediately contact the NAVCRUITDIST Education Specialist (ESS) to schedule a visit to the school. On this visit, the ESS has the lead. The recruiter is only there to be introduced and, hopefully, gain permission to come on campus. The recruiter shall be squared away in uniform and maintain professional demeanor. Allow your ESS to do what they do best.

<u>No Access – Example C</u>

Activity	Allowed	
	Yes	No
Initial Visit		X
Career Talks		X
NROTC Talks		X
Band Talks		X
ASVAB		X
Certificate Prg		X
Final Visit		X
AC Campus		X
Official List		X

  b. <u>Status</u>. After a school's access is determined, the next step is to determine the "Status." There are three categories that define status, Working (W), Non-Working (NW) and Non-Cooperative (NC). It is very important to understand that the "status" of a school only indicates whether the program elements of the HS/CC Program will be conducted. <u>It does not indicate that no effort will be expended to get contracts from this institution</u>. The LPO/LCPO should; therefore, examine each school carefully considering things such as past contracting history, class size, time and effort, percent of student population that goes on to a four year institution, and the relationship with the school before deciding whether a full program should, or can be conducted.

   (1) <u>Working Schools (W)</u>. These are schools in which the elements of the HS/CC Program will be conducted according to the Division Leading Chief Petty Officer's Milestones. They usually have sufficient senior class size, students can generally pass the ASVAB, recruiters have enough access to the school, past contract productivity indicates that the time and effort necessary to perform the elements of the HS/CC Program are justified and the percentage of students who go to a four-year college is not unusually high. The LPO/LCPO needs to be extremely careful when evaluating the "Status" of a school. A school that has "Limited" access can be considered "Working." A school that allows recruiters to perform elements of the HS/CC Program, but who's directory information cannot be obtained by any means, has an "Access" or "Limited", but can still be considered for a status of "Working". In this example, working a program may be the only effective way to obtain the contracting potential of this school.

   (2) <u>Non-Working (NW) Schools</u>. A non-working school is one where the LPO/LCPO and the Division Leading Chief Petty Officer deem it ineffective to work a program. Therefore, program elements deemed worthwhile to conduct will not be tracked on Division Leading Chief Petty Officer's Milestones

There are many reasons why a school may be considered "Non-Working". <u>Non-Working does not mean that we will not have a plan to get all the contracts we can from this school. It means that a recruiter will not conduct elements of the program because it does not make good business sense in this particular school</u>. Non-Working schools can always be upgraded in future years. Status shall be carefully considered annually by the LPO/LCPO when conducting the structure analysis in April or May. The following examples of "Non-Working" schools are provided to assist in understanding:

(a) Schools where the access to the student population may be "Full," but the senior class size is so small, distance to the school so great, or past productivity indicate that the time and effort necessary to conduct the elements of the HS/CC Program would not justify the return on investment. The LPO/LCPO should keep in mind that it is always smart to conduct some of the elements of the HS/CC Program in small schools. Small schools with full access will still provide contracts and the WCS, working with his recruiters, shall have a plan to get those contracts. <u>In this example, the LPO/LCPO, with permission from the Division Leading Chief Petty Officer, has made a calculated decision not to work the elements of the HS/CC Program, therefore giving it a "Status" of "Non-Working."</u>

(b) Schools where access to student population may be "Full," but historically the contracting results generated from this asset indicate that conducting the elements of the HS/CC Program are not justified. This is usually true within schools where a large percentage of the student population goes on to a four-year institution. Again, the LPO/LCPO should keep in mind that there are contracts in this student population and shall have a plan to obtain them. This particular example is a school where NROTC candidates can be obtained, and for that reason, the school should be part of the LPO/LCPO's plan. Specifically, giving NROTC talks, at a minimum, should be part of the plan.

(c) Schools determined by the Division Leading Chief Petty Officer to be non-working schools shall have the school folders marked with a red diagonal line on the front cover with the Division Leading Chief Petty Officers signature and date. School folders for non-working schools shall be filed together in a separate binder as opposed to a SOAR binder. Information on page 2 of the school folder shall be completed to the best of the Recruiters ability and a minimum of one visit shall be conducted during the school year to obtain schools lists, update student population and faculty contact information.

(3) <u>Non-Cooperative Schools (NC)</u>. These are schools in which a full program may be desired, but access to the student population is "No Access." The LPO/LCPO must involve the ESSs to meet with school officials. Until school policies have been successfully changed to allow some sort of access, recruiters cannot plan and execute the program in these schools. The following are some ideas the LPO/LCPO might use to turn around non-cooperative schools:

(a) Contact the Commanding Officer and request that a member of the Command visit the school to talk with the administrators.

(b) Ask school officials if they will allow distribution of literature within the school. This provides some opportunities for contact when you deliver and restock the material at the school.

(c) Check the local Reserve Unit for Navy that may be employees, teachers, coaches, or influential members of the school. See if they can bring about a change in school policy regarding recruiters.

(d) Contact the local Navy affiliates, such as the Navy League, MTUs, etc., to find out if they have points of contact in the school system that can help obtain cooperation.

(e) Attempt to introduce the Naval Reserve Office Training Corps (NROTC) scholarship program to the faculty and counselor staff. In many cases, the hesitancy to allow recruiters access to the student body or school grounds is because of lack of understanding of the opportunities available to students.

(4) The most important decision in the high school plan is determining the school's STATUS. When assigning a STATUS to each school, be sure the recruiters have a good distribution/ spread so they have enough working schools; a sufficient number of seniors must be available to make their recruiting mission every year. Be aware that the sizes of schools between NAVCRUITSTA's vary. The largest school in one area may be the smallest in another NAVCRUITSTA. The relative sizes of the schools in the area must be looked at carefully when determining their STATUS.

c. Priority. Priorities are only assigned to working schools and are defined by the amount of effort and time planned in a school relative to the effort planned in other schools. The recruiter will spend more time and effort in schools with a Priority 1 rating than those with a Priority of 2. Priority determines and directs the recruiting effort into schools that will be most productive.

(1) The LPO/LCPO and the Division Leading Chief Petty Officer shall assign a Priority designation to each school based on a combination of the following factors:

(a) The size of the male senior or college class population

(b) The percentage of male students that generally go to a four-year college

(c) The ASVAB pass rate and the percentage of mental group (MG) I-IIIAs in the school

(d) The number of senior or community college contracts written in the past years from the school

(e) Access to the school

(2) A working school will be assigned one Priority from among the following three:

(a) <u>Priority 1</u> - A school, where the combination of male senior population (minus those that go to a four-year college), ASVAB pass rate, MG I-IIIA%, past and potential results, and access to the school, indicates that the recruiter's efforts should achieve excellent results (i.e., the greatest number of senior contracts).

(b) <u>Priority 2</u> - A school where a combination of the same factors above indicates that the recruiter should achieve good results from the time and effort expended.

(c) <u>Priority 3</u> - A school where the combination of the same factors above indicate that the recruiter should only obtain sufficient contracts to keep the school working.

(3) The assignment of priority should be a carefully considered judgment calls on the part of the LPO/LCPO and DLCPO. The guidelines above are not precise, and for good reason: every combination of factors simply cannot be stated. Just remember that priorities are assigned to the schools in order to organize recruiter efforts and to maximize the results of efforts in the program. Common sense will help decide the borderline cases.

(4) LPO/LCPO's will enter the priority they assign to each school on their High School/Community College Profile Sheet. The NAVCRUITSTA records the priority of each school on the respective High School folder. Non Working Schools are not assigned a priority.

(5) Clearly mark the front of the school folder with the appropriate assigned Category/Status, Access, and Priority. Do not assign a priority to non-working schools.

(6) High School/Community College Canvassing Plan. No later than 15 June each year, the NAVCRUITSTA provides the DLCPO with a canvassing plan displaying basic data for each school in the NAVCRUITSTA and the results attained in those schools during the previous year. In addition, the LPO/LCPO integrates the DLCPO's Milestones. The DLCPO's Milestones state the objectives and timetable for accomplishing them in the upcoming school year. The LPO/LCPO uses the canvassing plan and the DLCPO's Milestones to develop the NAVCRUITSTA's plan for next year. The final plan must meet and be consistent with the established NAVCRUITDIST milestones. Both LPO/LCPO and DLCPO must sign off on the plan in the school folder.

When signed by the LPO/LCPO the plan is understood and acknowledged as a legitimate working plan, which will be carried out by the recruiter. The LPO/LCPO shall use the following guidelines when preparing the new High School/Community College Canvassing Plan:

(a) Compare each school's new data with the latest High School or Community College data received. Circle any changes in <u>red</u> and write in the correct information.

(b) Evaluate last year's plan and record the following information in the school folder:

<u>1</u>. INITIAL VISIT - The month planned to make the <u>Initial Visit</u> to the school, e.g., 01 = Jan, 12 = Dec, etc.

<u>2</u>. SENIOR LIST – The month planned to obtain the senior list.

<u>3</u>. JUNIOR LIST – The month planned to obtain the junior list.

<u>4</u>. NROTC (SR) - The month planned to make the NROTC (SR) talk.

<u>5</u>. NROTC (JR) - The month planned to make the NROTC (JR) talk.

<u>6</u>. CAREER TALK - The month planned to make the Career Talk.

<u>7</u>. BAND TALK - The month planned to make the band talk.

<u>8</u>. 1ST SENIOR - The month planned to contract the 1st senior in the school.

<u>9</u>. ASVAB RESP - Enter "Y" for yes, if the NAVCRUITSTA is responsible for coordinating ASVAB testing in the school. Enter "N" for no, if not.

(c) Ensure all entries are complete and accurate for each working school and make sure the plan meets the DLCPO's Milestones.

(d) The LPO/LCPO returns the completed planning sheets to the LCPO no later than <u>15 July</u> each year. The DLCPO will review the new plan and enter it into the Divisions canvassing plan. By <u>15 August</u> the DLCPO must return them to the LPO/LCPO and recruiters.

(e) The LPO/LCPO reports any errors immediately to the DLCPO.

040311. <u>KEY PROGRAM ACTION DATES</u>. Below is a calendar of key action dates. They may require modification based on individual school schedules, Division Leading Chief Petty Officer's Milestones, and the Master Plan. Nevertheless, the following can be a helpful guide:

a. <u>June</u>

   (1) Attend the high school graduation

   (2) Collect and verify diplomas of graduating Future Sailors

   (3) Obtain a graduate list

   (4) Start Initial Visits to working schools
   (5) Plan recruiting activities in summer schools

   (6) Prepare new HS/CC folders for next year's program

   (7) Review with the <mark>LPO/LCPO</mark> next year's Canvassing Plan

   (8) Review with the <mark>LPO/LCPO</mark> next year's <mark>Division Leading Chief Petty Officer's</mark> Milestones

   (9) Begin contracting and processing next year's seniors

   (10) Monitor senior Future Sailors for academic progress and referrals

b. <u>July – August</u>

   (1) Complete the new Master Plan by 15 July

   (2) Identify contacts in the area (Reserve units, Navy League, etc.) that can support and help the program

   (3) Finalize the Master Plan by 15 August

   (4) Make new HS/CC Folders for all working schools

   (5) Continue Initial Visits at the end of August

   (6) Continue contracting and processing next year's seniors

   (7) Monitor senior Future Sailors for academic progress and referrals

c. <u>September – October</u>

   (1) Complete Initial Visits to working schools

   (2) Update and complete school folders for all working schools

CHAPTER 5

ENLISTED RECRUITING PRODUCTION AND MANAGEMENT SYSTEM

SECTION 1

INTRODUCTION

050101. BACKGROUND. The Enlisted Recruiter Production and Management System (ERPMS) is designed for the Leading Petty Officer/Leading Chief Petty Officer (LPO/LCPO) to manage all available resources within the Navy Recruiting Station (NAVCRUITSTA) to achieve goal. The Division Leading Chief Petty Officer (LCPO) shall train and direct each LPO/LCPO in system use and monitor recruiter production through the LPO/LCPO. When used in conjunction with other available systems, ERPMS can effectively increase production and improve recruiter quality of life.

050102. PURPOSE. ERPMS provides production personnel with the tools necessary to effectively plan and evaluate recruiting activities to achieve goal. The following sheets, logs, and planners shall be used by the recruiter, LPO/LCPO, DLCPO, Chief Recruiter (CR)/Assistant Chief Recruiter (ACR), Navy Recruiting District (NAVCRUITDIST) Trainer and Nuclear Field (NF) coordinator to plan and evaluate production requirements:

   a. Monthly Planner/Itinerary. Each CR, ACR, DLCPO, NAVCRUITDIST trainer, NSW/NSO coordinator and NF coordinator shall maintain a monthly planner/itinerary to be published and distributed to each NAVCRUITSTA and key NAVCRUITDIST and Military Entrance Processing (MEPS) personnel (e.g., Commanding Officer (CO), Executive Officer (XO), Recruiting Programs Officer (R-OPS), CR, DIVO, Enlisted Processing Division Supervisor (EPDS), Marketing & Advertising Officer (MAO), Command Master Chief (CMDCM), etc.). Retain current plus previous 12-months.

   b. Station Planner. LPO/LCPO shall retain current plus previous twelve months.

   c. Recruiter's Weekly Planner. Each recruiter will maintain a weekly planner utilizing the Microsoft Outlook Calendar. The recruiter planner reflects the daily prospecting and processing plan, and is used to update the LPO/LCPO's planner during the Daily Production Review (DPR). Recruiters shall retain current plus previous 12-months.

   d. Applicant Log. Will be computer generated for the recruiter, LPO/LCPO, and NF coordinator and NSW/NSO coordinator. The DLCPO shall use the Excel applicant log. Retain current plus previous 12 months.

   e. Production Analysis Training and Evaluation Sheet (PATE). PATE shall be used to analyze Division, NAVCRUITSTA, and recruiter prospecting and sales performance. Each recruiter, LPO/LCPO and DLCPO shall maintain a monthly PATE sheet based on a three

SECTION 2

PLANNERS

050201. PURPOSE. Success is measured by results obtained from daily, weekly, monthly, and annual activities. Many people wrongly equate effort with the quantity of time spent at work when it is the quality of time that is important. The planner facilitates proper time management and can determine where time is being wasted and where it can be used to increase productivity.

050202. SCHEDULING AND PLANNING. Detailed scheduling and planning focuses effort, reduces conflicts and maximizes productivity time.

a. Scheduling occurs in response to tasks received from others. For example, the LPO/LCPO directs a recruiter to bring in an applicant for follow-up. The recruiter could easily have wasted productive hours waiting for the applicant to show if this task were not scheduled.

b. Planning is the primary key to success. Recruiters must be able to construct daily, weekly, monthly, and yearly plans. Recruiters and LPO/LCPOs often find this difficult as they have little practice in plan development. Planning revolves around the two most important tasks for a recruiter: prospecting and selling. Planning shall be coordinated, consistent, and thorough; "If you fail to plan, you plan to fail."

050203. MONTHLY PLANNER. Prior to scheduling the DLCPO monthly calendar, it is imperative that the DLCPO thoroughly analyze the specific needs in the areas of PQS qualifications, training, inspections, follow-up visits, DEP meetings, etc., and list the items scheduled for inspection during the station visit. Just as a LPO/LCPO is expected to ensure that prospecting activity occurs as planned, the DLCPO shall make every effort to follow the published calendar. Since all planned activity should be directly related to improving production, there will be times during the month when the plan will require adjustment due to changing production requirements.

Note 1: The XO shall review, adjust, and approve the NAVCRUITDIST trainer's monthly planners.

Note 2: The CR shall review, adjust, and approve the ACR, DLCPO NSW/NSO, DEPCO, NROTC, and NF coordinator monthly planners.

Note 3: The DLCPO shall review, adjust, and approve all assigned LPO/LCPO's weekly planners .

Note 4: NAVCRUITSTA LPO/LCPO's shall review, adjust, and approve all assigned Recruiters weekly planners .

050204. LPO/LCPO/RECRUITER PLANNER. The planner is the primary method for planning and executing daily activities.

a. The Leading Petty Officer/Leading Chief Petty Officer shall review/adjust the planner on a daily basis during DPR. The planner can be viewed in a variety of ways; laptop, printed copy or on internet.

b. Required planner documentation at a minimum, will consist of the following:

1. Prospecting

2. Processing

3. Training

4. College/High School visits

5. SOARs

6. Other activity deemed necessary to achieve assigned goal

c. Planners and category tables shall be maintained for inspection purposes. When a LPO/LCPO or recruiter transfers, a copy of the last 12-months of planners will be retained.

d. The LPO/LCPO will review each assigned recruiters' planner on Friday showing all scheduled activity for the upcoming week. The LPO/LCPO will also review the next 30 days of scheduled events to ensure adequate preparation has been provided. (This includes college, high school and diversity events, job fairs, luncheons, future Sailor mentoring, etc.) This will allow the LPO/LCPO to monitor activity and help the recruiter work their prospecting plan.

e. **Station LPO/LCPO will assign prospecting expectations.** These expectations will be documented on the planner.

1. On the first production day of each month, the activity for the month and first week will be placed at the very top of the calendar right under the calendar day, (Month = A: 96/0, I: 67/0 Week A: 24/0, I: 16/0). On the second and all consecutive weeks, the activity required for the week will be listed.

2. Daily required appointments and interviews documented in the 0800 timeslot of the recruiters' planner. (A = Req'd/Attn, I = Req'd/Attn)

3. The LPO/LCPO will monitor activity and make adjustments as needed.

f. Standardized categories will be used with activity entered onto the planner. These are the minimum categories required and will be known as the "MASTER CATEGORIES".

CATEGORY TITLE	COLOR CODE
1. Prospecting (All)	Orange
2. Appointment	Yellow
3. Appointment-NO SHOW	Yellow
4. Appointment-Rescheduled	Yellow
5. Interview	Green
6. DPR	Blue
7. Training	Purple
8. Future Sailors activities/training	Red
9. Recruiter Leave/Special Liberty	Maroon

g. Expectations and adjustments. Outlined below is the required documentation for setting up the planner. Results of prospecting activity can be tracked on the table views via Microsoft Outlook.

1. When expectations are established between the LPO/LCPO and the recruiter, the recruiter will ensure all specific goals will be documented on the planner.

2. Appointments and interviews will be documented on the planner using the applicant last name, education code and prospecting lead source, (i.e. Sampson 12L PD) and highlighted based on the master category color code.

3. Rescheduled/Adjusted prospecting activity will be documented on the planner in the rescheduled time slot as follows: RS=reschedule (RS) 12L PH PWR-38001; (RS) 11S PH PWR Millington HS; (RS) PDC 38001. All prospecting will be highlighted in Orange.

4. Rescheduled/Adjusted appointments will be documented on the planner in the rescheduled time slot as follows: RS-1204 Sampson 16K PH highlighted in Yellow. (RS=reschedule, 1204=date of original scheduled appointment, Sampson=prospect last name, 16K=prospect ED Code, PH=Lead source)

Note: The initial scheduled prospecting activity/appointment will remain listed in the original time slot. The recruiter will annotate the original prospecting activity/appointment as follows to reflect it was rescheduled: Example of prospecting = 12L PH PWR-38001 (RS to date/time); Example of appointment = Sampson 12L PH (RS-date/time).

050205. DIVISION LEADING CHIEF PETTY OFFICER STATION VISIT

a. The purposes of the DLCPO visit are to provide training, improve production, and present awards. Upon completion of a NAVCRUITSTA visit, the DLCPO is required to submit a NAVCRUITSTA visit report (Exhibit 050203) to the CR.

b. Proper preparation shall be made prior to conducting a NAVCRUITSTA visit. The breakdown of PATE sheets, market for NAVCRUITSTA identification of hot zip codes ("hot zip codes" may vary from one NAVCRUITSTA to another) and any other time consuming tasks should be completed before the visit. This should make the visit more efficient and provide more time for training the LPO/LCPO. Part of the training process includes following up on previously noted deficiencies. This is also a perfect opportunity to increase morale. Above all, Division business should not interfere with the NAVCRUITSTA prospecting plan.

c. One of the most productive days for the NAVCRUITSTA should be when the DLCPO visits. The LPO/LCPO and DLCPO should coordinate with the CR to avoid scheduling conflicts. For long range planning, review the command calendar or Plan of the Week for future dates for meetings, training, and other recurring events.

EXHIBIT 050201. <mark>DIVISION LEADING CHIEF PETTY OFFICER NAVCRUITSTA VISIT CHECKLIST</mark>

NAVCRUITDIV:_____   NAVCRUITSTA:_____

RECRUITERS:_____ LPO/LCPO:_____   QUALIFIED: Y/N

NAVCRUITSTA APPEARANCE

Does the office have a professional appearance?	Y/N
Are government vehicles clean (interior/exterior)?	Y/N
Are recruiters' appearances within military standards?	Y/N
Is PRT and advancement study time implemented?	Y/N

DELAYED ENTRY PROGRAM

Verify DEP status board against number of DEP records in WEBRTOOLS and record #.	____
Check new DEP records for blueprinting and PSS tab for completion.	S/U/I
Have contacts been made on all records for the previous month?	Y/N
Have all changes in DEP status been recorded in remarks section?	Y/N
Have folders on new Future Sailors been created?	Y/N
Are 72-hour indoctrinations being completed?	Y/N
Are 5305's submitted and tracked?	Y/N
Record # of in-month shippers. Verify 30-day recertification for each. DLCPO exec a minimum of three during visit.	____
Record # of next month shippers. Verify monthly recertification for each. DLCPO exec a minimum of three during visit.	____
Record # of shippers two months out.	____
Previous month's DEP attendance percentage. DLCPO exec a minimum of three no-shows.	____
Review DEP PQS tracking sheet and schedule PQS boards.	S/U

ERPMS

Total # of applicants waiting processing. Verify all kit paperwork and documents are present for processing.	____
Total # of interviews on applicant log.	____
Total # of qualified interviews on applicant log. Exec a minimum of three applicants during visit. Ask for referrals.	____
Is prospecting targeted in "hot" zip codes? Exec a minimum of three prospects from "hot" zip codes. Ask for referrals.	Y/N
Are School of Area of Responsibility (SOAR) evolutions properly performed?	Y/N
Is the NAVCRUITSTA planner complete and up to date?	Y/N
Review and document training using last and current month PATE sheets.	Y/N
Observe one DPR during NAVCRUITSTA visit.	S / U

COMMENTS ON DPR:

_____
_____
_____
_____
_____

Are record status and disposition codes properly recorded on the activities tab?	Y/N
Has drill verification been completed on all prior attainments in past 60 days.	Y/N
Is Working Tickler (WT) loaded IAW goaling letter.	Y/N
Count number of duplicate records in system.	_____

SMART

Is the SMART up to date? (NC, QNE, GOAL RECAPS, ETC)	Y/N
Review and initial School/SOAR folders.	S/U/I
Verify and review recruiter fair share break down using the All Service Accession Data (ASAD) from WEBSTEAM?	S/U/I
Has the LPO/LCPO logged onto WEBSTEAM during the last 30 days and reviewed NAVCRUITSTA data?	Y/N

LEADS

(WEBRTOOLS and CIRIMS Web)

Are downloads completed daily?	Y/N

Are LEADS contacted within 24 hours?   Y/N
Exec a minimum of three LEADS.
Ask for referrals.

Are NALTS/Local LEADS returned within 30 days?   Y/N

Review LEADS ratio with LPO/LCPO using the data from NALTS.
                                                                        S/U

Total # of overdue hot LEADs.   _____

TRAINING

Is Formal/GMT training planned and conducted?   Y/N

Is OJT and follow-up training documented?   Y/N

Is recruiter PQS/Indoc up to date?   Y/N

DLCPO REMARKS AND FOLLOW-UP TASKINGS FOR LPO/LCPO SHALL BE DOCUMENTED ON A TRAINING SYLLABUS:

_____
_____
_____
_____
_____

LPO/LCPO SIGNATURE: _____

DLCPO SIGNATURE: _____

DATE: _____

SECTION 3

PRODUCTION ANALYSIS TRAINING and EVALUATION (PATE)

050301. GENERAL. Recruiting uses standard forms to collect and analyze data and set mission objectives. The collected data helps identify whether enough prospecting was accomplished to meet mission objectives. Analysis of the data will indicate how effective a recruiter was at various recruiting activities (prospecting, screening, selling, processing) and identifies specific strengths and weaknesses. Collecting data is meaningless unless it is accurate and used to make the recruiting effort more efficient.

050302. CRITERIA. The PATE Sheet (Exhibit 050301) shall be used to analyze Division, NAVCRUITSTA, and individual prospecting and sales performance. The PATE provides information necessary to conduct proper activity analysis and a baseline for the recruiter, LPO/LCPO and DLCPO to develop an effective prospecting plan. The data for the PATE sheet comes from the past three months applicant logs and planners of the recruiter, NAVCRUITSTA, and Division for the past three months. The following criteria shall be used to build and analyze the PATE sheet:

   a. Each Recruiter, LPO/LCPO and DLCPO and DIVO will maintain a current month PATE sheet. PATE sheets shall accompany the applicant logs for the month in which the activity is being tracked.

Note 1: Retain current plus previous 2 years of recruiter/ NAVCRUITSTA and Division sheets.

Note 2: NAVCRUITDISTs do not maintain applicant logs and shall only review the PATE sheets as needed.

050303. BUILDING A PROSPECTING PLAN. The Division and NAVCRUITSTA level-prospecting plans are an accumulation of all recruiter plans. The plans shall be reviewed by the immediate supervisor at the beginning of each month to insure the activity plan is built to support mission accomplishment by utilizing PATE sheet data.

   a. The prospecting plan shall be developed by taking the number of projected new contracts for the month (for each individual recruiter), to include attrition, the number of interviews required for one N/C based off of the recruiter's (ratios) talent level from the PATE sheet, the number of appointments required for one N/C, and the number of processing days left in the month. This information will help determine what is needed to support the mission on a daily basis and build each recruiter's pool of new prospects/contracts. New recruiters shall use the NAVCRUITSTA average to determine prospecting levels until they have developed their own pool of prospective new contracts. This process will normally take 6 to 8 weeks.

   b. The following information should be taken into consideration when building a prospecting plan:

EXHIBIT 050301. PRODUCTION ANALYSIS TRAINING and EVALUATION (PATE)

MONTH   OCT 08   **RCTR/STA/DIV   CS1 Ames/Medford/Southern**

SECTION I PROSPECTING GENERATED

PHONE/LEADS

MONTH	APPT	INTV	PHYS	NC
JUL	11	7	1	1
AUG	12	8	1	0
SEP	11	7	3	2
Totals	34	22	5	3

REFERRALS (RA, RC, RD, RI, RS)

MONTH	APPT	INTV	PHYS	NC
JUL	2	1	0	0
AUG	2	0	0	0
SEP	1	1	1	1
Totals	5	2	1	1

PERSONALLY DEVELOPOED CONTACTS and SOCIAL NETWORKING/INTERNET

MONTH	APPT	INTV	PHYS	NC
JUL	7	4	1	1
AUG	8	4	1	1
SEP	9	5	0	0
Totals	24	13	2	2

SECTION II PROSPECTING SUMMARY (Ratios for 1 New Contract)

	APPT	INTV	PHYS	NC
REQ'D FOR 1 PH NC	11.3	7.3	1.7	1

	APPT	INTV	PHYS	NC
REQ'D FOR 1 REF NC	5.0	2.0	1.0	1

	APPT	INTV	PHYS	NC
REQ'D FOR 1 PD/SN NC	12.0	6.5	1.0	1

SECTION III PROSPECTING PLAN GUIDANCE

A. Monthly Goal

3
NC Total   Monthly Goal by Source Code   **1**   **1**   **1**
                                                      PH   **REF**   **PD/SN**

B. Total Monthly Activity Required To Achieve Goal (Used to build Prospecting Plan)

APPTS	INTVS	PHYS	NC
28.3	15.8	3.7	3

SECTION IV OTHER ACTIVITY

MAIL OUTS AND WALK-INS

MONTH	INTV	NC
JUL	6	1
AUG	6	0
SEP	6	1
Totals	18	2

RECRUITER SIGN: _____

LPO/LCPO SIGN: _____   **DATE:** _____

EXHIBIT 050301. PRODUCTION ANALYSIS TRAINING and EVALUATION (PATE)

DIRECTIONS

SECTION I: PROSPECTING GENERATED

This section is the three month historical prospecting data broken down into the three primary source codes: PH (Phone), REF (Referrals) to include RA (Applicant), RC (School Counselor), RD (DEP), RI (Center of Influence), and RS (Other Service) also PD (Personal Developed Contacts)/SN (Social Networking/Internet). The Recruiter, LPO/LCPO or Division Leading Chief Petty Officer will place all appointments, interviews, physicals and new contracts in the last three months prospecting activity blocks and totals at the bottom of the chart.

SECTION II: PROSPECTING SUMMARY

This section calculates each prospecting mode into an average number of appointment, interviews, and physicals required to write one New Contract in each of the 3 primary modes of prospecting. These averages are obtained by dividing the total number of appointments, interviews and physicals by the total NC in each prospecting mode respectively. These numbers should be rounded to one decimal place.

SECTION III: PROSPECTING PLAN GUIDANCE

A. Monthly Goal

This Sub-Section the Recruiter, LPO/LCPO or Division Leading Chief Petty Officer will place their monthly goal broken down by each primary source code and place the total of the three source codes in the NC Total block.

B. Monthly Minimum Activity Required to Achieve Goal

This Sub-section includes the total number of appointments, interviews, physicals and new contracts for the current month that the Recruiter, LPO/LCPO or Division Leading Chief Petty Officer is required to obtain to meet the monthly prospecting objectives. This section will add from each primary source code in Section II, the total number of appointments, interviews, physicals and new contracts required based on the three month averages. This section is where the Recruiter, LPO/LCPO or Division Leading Chief Petty Officer will build their daily, weekly and monthly prospecting plans.

SECTION IV: OTHER ACTIVITY

This section provides the Recruiter, LPO/LCPO or Division Leading Chief Petty Officer the three month historical look and total number of interviews and New Contracts written the two remaining source codes MO (Mailouts) and WI (Walk-ins).

SECTION 4

APPLICANT LOGS

050401. PURPOSE. The applicant log is used by recruiting personnel to track applicants from initial appointment to final disposition and serves as a training aid. While there is no set number of applicants for a recruiter to actively prospect, the recruiter cannot consistently work prospects that do not qualify for enlistment.

   a. The LPO/LCPO and recruiter, with assistance from the DLCPO, must be selective with targeting/developing the individuals that are being prospected. Quality prospecting will produce quality enlistments.

   b. A prospect is defined as an individual who appears to be mentally, morally, and physically qualified. Prospects that disclose problems with Basic Enlistment Eligibility Requirements (BEERs) during the blueprinting process are not to be considered as interviews until the applicant resolves the disclosed problems. Qualified interviews are defined as prospects who are mentally, morally and physically qualified, and a complete PSS sales presentation was conducted.

050402. CRITERIA. Each recruiter, LPO/LCPO, NF coordinator, NSW/NSO coordinator and DLCPO shall maintain a current month applicant log, (Exhibit 050401). All applicant logs shall be updated daily. The following criteria shall be used for annotation of applicant logs:

   a. Recruiter Applicant Log. Enter all sales interviews conducted into WEBRTOOLS. Any interview that has been conducted in the previous 12 months and is interviewed again shall be counted as a carryover.

   b. NAVCRUITSTA Applicant Log. Enter all interviews conducted, the NAVCRUITSTA applicant/prospect log will reflect the data from the NAVCRUITSTA recruiter applicant/prospect log(s). Any interview that has been conducted in the previous 12 months and is interviewed again shall be counted as a carryover. The LPO/LCPO is required to conduct a follow-up screening on all qualified interviews entered on the applicant log.

   c. Division Applicant Log. Enter all applicants that appear to be qualified. The DLCPO shall enter all qualified applicants that are listed on each NAVCRUITSTA applicant log as the DPR is conducted. This shall be done daily. The DLCPO must maintain a separate applicant log for each NAVCRUITSTA and update each log during the DPR. This can be accomplished by telephone or in person.

Note. Faxing or emailing of NAVCRUITSTA applicant logs for daily production reviews IS NOT AUTHORIZED.

050403. NUCLEAR FIELD APPLICANT LOG. Each NF coordinator shall maintain a current month NF applicant log. When an applicant who meets initial qualifications for the NF program is identified on the recruiter's applicant log, the <mark>DLCPO</mark> should contact the NF coordinator to ensure information is recorded on the NF applicant log. This allows the NF coordinator and their supervisors to track all NF applicants being processed who are potential enlistees. The NF coordinator shall total all data at the end of the month and submit the applicant log to the CR for review. Carryover information should not be recounted.

Note. For continuity purposes the NF coordinator shall use the same applicant logs as recruiters.

050404. ANALYSIS OF APPLICANT LOG. The complexities of planning can sometimes overwhelm the average recruiter because of the number of variables to be considered. Put into logical sequence, the plan is easily understood once an applicant is determined to be qualified. A sense of urgency is essential in getting face-to-face with qualified applicants that can be moved to the next step. Applicant logs must be analyzed by order of priority:

   a. Hot - These are applicants that have a high probability to enlist or have attempted to enlist and are awaiting some form of documentation or medical consultation. These applicants require daily follow-up by the <mark>LPO/LCPO</mark>.

   b. Warm - These applicants have given a favorable response to the recruiter's proposal, but need time to think about it or consult with a significant other prior to making a decision. These applicants require daily <mark>LPO/LCPO</mark>/recruiter attention.

   c. Cold - These applicants are basic follow-ups that declined or were not qualified at the time of interview. A waiting period may be required prior to continued processing. These applicants require daily recruiter attention to determine if circumstances have changed.

Note. The key is to always have applicants on the applicant log to contact. The recruiter should try every day to move applicants from cold to hot priority. Recruiters who have no interviews on their applicant log require immediate attention to determine shortfalls in their prospecting. The <mark>DLCPO</mark> shall determine the level of attention required to get the recruiter back into a productive mode.

EXHIBIT 050401. APPLICANT LOG

APPLICANT LOG

DIV / STATION / RECRUITER **MONTH / YEAR**

Recruiter SSN / Component Active/Reserve	# of APPT	INT DATE	Name (Last First MI) SSN	PHONE #'S	INT COD	AGE	RECODE RATE	PROG CAT	DEPN	ED LV	EST	ASVAB Score DATE	NFQT	PHYSICAL PASS	PHYSICAL TMR	PHYSICAL FAIL	WVR	RESRVN NUMBER	NC DATE	DISPO	Remarks
XXX-XX-6789	1	C/O	BITZ, JOSEPH L.	C-303-435-1441			RE1	CBV				89									
active		6/12	XXX-XX-3333	H-303-400-4444	RP	38	CM3	A1	2	12L	99	11/5	55	11/5				cm123456	6/12		

	Total						Total Physicals					Total Contracts	
	1						1					1	

INT CODES
PH PHONE
RL LOCAL LEAD
RN NATIONAL LEAD
RD DEP REFERRAL
RA APPLICANT REFERRAL
RI COI/COUNSLOR
RS REFERRAL OTHER SERVICE
PD PERSONALLY DEVELOPED CONTACT
RP RAP/HARP/SEMINAR
SN SOCIAL NETWORKING
WI WALK IN

Disposition Codes
AFF   Affiliation
C/O   Carry Over
DECL   Decline to enlist
DEP   Delayed Entry Program
DIR   Direct Ship
ENL   Enlistment
EOS   Enlisted Other Service

NBQ   Not BEERS Qualified
NME   Not Morally Eligible
NMQ   Not Mentally Qualified
PMR   Permanently Medically Rejected
QNE   Qualified, Not Enlisted
TMR   Temporary Medically Rejected

Waiver Codes & Authority
1 Re Code   N NAVCRUITDIST
2 Dependency   A Area
3 Accession   R Region
4 Medical   C COMNAVCRUITCOM
5 Civil   P Pers
6 Drug / Alcohol   B BUMED
NAVCRUIT 1133/107 (9-05)

SECTION 5

DAILY PRODUCTION REVIEWS

Recruiters prospect to fill the Applicant Log with good, quality interviews. Recruiters do interviews to write new contracts to support the Navy's manning objectives.

050501. GENERAL. The Daily Production Review is one of the most critical operations in a Navy Recruiting Station. It allows the chain of command to review, plan, adjust, and train to recruiting activities. The DLCPO and LPO/LCPO must be able to explain the following questions:

    a. What is the status of any remaining shippers for the current and next out month?

    b. How many production days are available for the remainder of the month?

    c. How many new contracts are necessary to attain the NAVCRUITSTA, Division and NAVCRUITDIST mission?

    d. What program goals still need to be filled to attain NAVCRUITSTA, Division, and NAVCRUITDIST mission?

    e. What is each recruiter's fair share of the NAVCRUITSTA mission?

    f. Is the current prospecting plan working or are adjustments necessary?

    g. On average, how many new interviews are needed to obtain a new contract?

    h. Are there any constraints in certain programs, sub-goals, or mental categories? Are there any scheduling problems or special circumstances?

050502. DAILY PRODUCTION REVIEW FROM LPO/LCPO TO RECRUITER. As each new recruiter checks into the NAVCRUITSTA, the LPO/LCPO must train the recruiter on how to prepare for, and what to expect during the DPR. Additionally, the LPO/LCPO should make note of the questions that are repeatedly asked by the DLCPO during the LPO/LCPO to DLCPO DPR. Although questions may vary from day to day, certain standards will appear over time. As a guideline of what to expect from the DLCPO, review the DLCPO to LPO/LCPO DPR discussed in this Chapter.

    a. The formal DPR shall be held a minimum of once each workday. This is the single most important daily interaction between the LPO/LCPO and recruiter and should not be changed if possible. Begin the DPR in an uncluttered environment and assign another recruiter to answer the telephone and take care of the office. The more prepared the LPO/LCPO is during the DPR, the more efficient the recruiter will perform.

b. Applicant follow-ups shall be done in a timely manner; training deficiencies shall not become production problems.

c. The <mark>LPO/LCPO</mark> shall continually check on the recruiter's progress throughout the day, as needed, to ensure the plan is being accomplished as approved, and that the desired results are being achieved.

d. In addition to conducting a formal DPR with the recruiter, the <mark>LPO/LCPO</mark> shall review the following items:

(1) The recruiter's Applicant Log for any new appointments or interviews.

(2) The Planner to ensure the interview/appointment is logged.

(3) Records of any new interviews that were conducted since the last DPR.

(4) Remarks section for the next scheduled processing activity.

(5) MEPS processing schedule.

(6) Working Tickler for proper filing of records and to review blueprinting information of applicants.

(7) Records of applicants with New Contract date for completion of DEP-in procedures.

(8) Number of interviews held to date. Are there sufficient interviews/new contracts to meet recruiter's fair share of station goal/personal goals? The <mark>LPO/LCPO</mark> needs to be aware of this before going any further.

(9) Prospecting results of each record marked for DPR. Analyze as necessary.

(10) All records loaded in the Working Tickler and ensure they comply with prospecting requirements in the NAVCRUITDIST Goaling letter.

(11) LEADS to ensure they are being actively worked. Qualified LEADS are to be maintained in the Working Tickler for four months or until enlisted, whichever comes first. Once the disposition is obtained on the prospect, the card shall be placed in the appropriate market segment file.

(12) Ensure that no records are in the Working Tickler with a Working Tickler date older than five days. This is the first sign of a follow-up problem.

(13) Ensure all known activity and new commitments are logged on the planner.

(14) Ensure the Station Planner is updated and that any scheduling conflicts are resolved.

(15) Ensure all DEP records are scheduled for the required monthly contacts. Schedule executive interview with LPO/LCPO for DEP personnel who will ship to RTC in the next 60 days.

(16) The LPO/LCPO has the final decision on the placement of all records. Recruiters are not authorized to control Working Ticklers.

050503. DLCPO TO LPO/LCPO DPR. The purpose of the DLCPO daily production review is to determine whether the NAVCRUITSTA is following the prospecting plan and is on track to attain all assigned goals.

a. The depth and frequency of the DPR will depend to a great extent on the experience level of the LPO/LCPO. Normally, the production review is accomplished daily however, DPRs for experienced LPO/LCPO's may only need to be held every other day or twice a week.

b. The following items shall be completed in addition to the formal DPR:

(1) Review new appointments and interviews that were held since the last DPR and ensure that all entries are correct. Review Basic Enlistment Eligibility Requirements (BEERs), discuss how the interviews went, and determine the next scheduled step in the process. Is executive follow-up required?

(2) Review previous entries to the applicant log. Ensure that the next processing step is scheduled, accomplished or has a disposition. Is Executive follow-up required?

(3) Have applicants been scheduled for processing on the Applicant Processing Log (APL) at MEPS?

(4) Does the recruiter have all the BEERS documents?

(5) If required, does the recruiter have parental consent?

(6) Is the kit completed or when will it be?

(7) Were there any problems with processing today?

(8) How many interviews did the recruiter have scheduled for today?

(9) How many interviews did the recruiter conduct today?

(10) Were "no show" and decline interviews followed-up?

(11) If rescheduled, what date, where and with whom?

(12) Were adjustments made on planner for prospecting shortfalls?

(13) How many interviews are scheduled for tomorrow? (When, where, and with whom)

(14) What modes of prospecting were used?

(15) What were the names of the referrals?

(16) How can I help? Is there any required training to be conducted?

(17) What activities (PRE) were projected/accomplished today?

(18) What does tomorrow's prospecting plan look like?

(19) What prospecting modes are scheduled?

(20) What market are we prospecting in?

(21) Has any required follow-up prospecting been accomplished?

(22) Did the recruiter receive any LEADS today? What is the status of overdue LEADS?

(23) Is the Working Tickler loaded in accordance with the NAVCRUITDIST Goaling letter?

(24) Have all Future Sailor contacts been accomplished per COMNAVCRUITCOM guidelines?

050504. CR/ACR TO DLCPO DPR. The purpose of the DPR between the CR/ACR and DLCPO is to determine if the DLCPO has an effective Prospecting Plan and if the Division is on track to attain all assigned goals. The depth of each DPR will depend on the experience level of the DLCPO. Develop a schedule that is mutually agreeable. The CR/ACR must have a thorough understanding of the production level of each Division to determine the following:

    a. Status of all Eligible Applicants. Review the status of all applicants scheduled to process in the next three days (as a maximum) to include validation of all enlistment requirements and medical blueprinting that may affect conversion percentages. If necessary, or if trend analysis dictates, determine if steps were taken to identify and correct individual station weaknesses and to make adjustments for processing shortfalls.

b. Prospecting Results. Do the efforts expended reflect the result achieved? Are appointments and interviews being attained? Does the DLCPO know the disposition of all new interviews? Is follow-up needed and is it scheduled and conducted (i.e., need to talk to parents, need to schedule another face-to-face for new objections)? From which market segments are interviews being attained? Review results of the Prospecting Plan for each Division and identify areas on which to have the DLCPO follow-up with executive screening (i.e., declined interviews, QNE's, LEADS).

c. Status of Near Term Shippers. Which shippers need to have additional executive follow-up by the DLCPO and/or CR/ACR? The health of the entire Division DEP pool should be discussed weekly. Discuss problems with the DEP (i.e., refusal to obligate, medical, moral, etc.) and actions taken to correct them. Short range, the DLCPO and recruiter should focus on problems with shippers within the next 30 days and long-range look at the entire DEP pool. Ensure follow-up is being completed.

d. Action to be Taken. Inquire what adjustments were made for missed activity. Based on the above information, determine training needs for the DLCPO and/or LPO/LCPO, and provide guidance and schedule follow-on training for upcoming division/station visits.

Note: If the CR/ACR is going to conduct training with a LPO/LCPO, then the DLCPO should be present to ensure follow-up for the training held is conducted.

e. Entire Command's Performance. The CR/ACR and the DLCPO should be constantly reviewing the performance of each individual to ensure that the command's expectations are met. If not, the chain of command must analyze and determine the cause of each person's shortfalls. Avoid focusing primarily on the short term; instead consider long-range performance (i.e., three months, six months) to determine manning discrepancies and division/station trends. Inquire from each DLCPO if there is a need for additional training/support (i.e., CO/XO/R-OPS BZ's, CR/ACR visit, NAVCRUITDIST/Region Trainers, logistic support, CMC visit, performance, personal or personnel problems).

approach to improving the selling skills of a recruiter from basic entry level recruiting to advanced sales. Applications training should take place approximately three months after receiving PSS Core.

c. <u>Professional Sales Coaching</u>. This program is designed for personnel in the position of <mark>LPO/LCPO</mark> and higher. It focuses on improving the communication skills, planning, knowledge and fundamental coaching skills of supervisory personnel.

d. <u>Professional Selling Skills Reinforcement Tool (CD-ROM)</u>. Provides an interactive review of Professional Selling Skills. Each recruiter should use the Professional Selling Skills CD-ROM for review purposes.

e. <u>Sales Performance Tool Kit (SPTK)</u>. The SPTK provides <mark>LPO/LCPO's</mark> the ability to review Professional Selling Skills and practice recognizing these skills in action. It also allows <mark>LPO/LCPO's</mark> to focus on specific areas of concern to ensure recruiters remain consistent with their selling techniques and product knowledge.

Note: All inquiries concerning sales and Achieve Global training shall be directed to Commander Navy Recruiting Command (N7).

060104. NAVY PRODUCT KNOWLEDGE. Once the recruiter masters the selling skills, they must add knowledge of the product/services. With an organization as large and diversified as the U. S. Navy, it is important that Navy Recruiters stay current on offerings for Active Duty and Reserve components. There are two resources field recruiters can access to get the most up to date information for Navy sales. The Features and Benefits CD focuses on information that will remain relatively constant throughout the course of the Sailors career. For access to information that will change on a regular basis, like pay charts, MGIB amounts, etc., refer to the recruiting quarterdeck located at **https://rq.COMNAVCRUITCOM.navy.mil**. The CD/website for Navy Features and Benefits is arranged as follows:

a. <u>Navy Core Values and COMNAVCRUITCOM Mission Statement/Priorities</u>. This section will contain an overview of the Navy's Core Values along with COMNAVCRUITCOM's Mission Statement and Priorities. All field recruiters shall keep core values in the forefront of their activities and be aware of COMNAVCRUITCOM's mission statement and current priorities to ensure full support.

b. <u>Navy Communities and Special Interest Areas</u>. This portion of the CD will assist recruiters while explaining the diverse career fields of the U. S. Navy, such as the structure of Navy Operational Support Centers, Special Warfare/Special Operations, Navy Nuclear Engineering, Aircrew and more.

c. <u>Ten Key Features of the U. S. Navy</u>. This section helps recruiters organize the many features of the Navy into ten key features (see below). All other features are support features. For instance, Educational Opportunities is a key feature, but, has